

# DFW Offboarding

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# Process Overview

1. Supervisors complete offboarding forms with HR
2. IT Service Desk tickets are created to create tasks for all (most) of the offboarding tasks
3. Supervisor is notified regarding offboarding employee's record management tasks
4. IGU performs second review before closing tickets
5. Automated process removes account from AD
6. Local and external drive backups transferred to Supervisor



# Helpful information



## Key data:

- Employee's position number
- Department and work unit information
- Supervisor's name
- Last day of employment
- Supervisor identifies next custodian
- Are there active legal or PRR holds?

# Key takeaways ...

- Get connected with IT and HR!
- Supervisors have more responsibilities in O365: OCM Risk!
  - New requirement: Supervisors must take action on their employee's records in O365 in addition to physical and locally stored digital records.
- Keep an issues log of anything/everything that doesn't work as expected.
- Document process steps and average time to completion.
- MS O365 has automation when an account is disabled.



# IGU Work



- Provide guidance documentation on “how”
  - i. Label in OneDrive and Exchange Online
  - ii. Instructional emails linked to guidance docs by platform
  - iii. Answer Supervisor questions about retention
- QA/QC:
  - i. Did the employee or supervisor conduct labelling?
  - ii. If not, how will IGU label the records prior to releasing the O365 license? (RO’s review and assessment)
  - iii. Any active legal or PRR holds?

